

# BISNIS Bulletin



Facilitating Commercial Success  
in Eurasia

June 2004



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## Spotlight on U.S. Exports to Eurasia in 2003

by Ben King and Ellen House

U.S. exports to the former Soviet Union fell slightly in 2003 compared to the previous year. Total exports to the 12 Eurasian countries last year were worth about \$3.69 billion, down from \$3.83 billion in 2002. Sales of various types of machinery and parts, particularly for the oil, gas, and telecommunications sectors, aircraft and vehicles, and meat and poultry, along with charity and government aid, continued to be the strongest categories of exports to the region.

### Russia

In 2003, Russia continued to be the leading trade partner with the United States in Eurasia, accounting for 66 percent of total exports to the region. U.S. exports to Russia in 2003 increased by 2 percent over 2002, totaling \$2.45 billion. Machinery for oil and gas extraction, poultry, and electrical parts remained the chief exports to Russia. Automotive and telecom sector exports both experienced growth over the past year, which made up for decreases in other areas.

Specific areas that made significant increases over 2003 were passenger motor vehicles, liquid pump parts and self-propelled boring or sinking machinery for the oil and gas sector. Other products that play a key role in U.S. exports to Russia are data processing

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### U.S. Exports to Eurasia, 2001–2003 (in US\$ millions)

	2003	2002	2001
Eurasia Total	3,688.2	3,836.2	3,816.3
Russia	2,447.2	2,397.0	2,716.0
Uzbekistan	256.1	138.5	144.9
Ukraine	230.6	254.8	200.0
Kazakhstan	168.2	604.6	160.3
Georgia	131.0	98.8	105.9
Azerbaijan	119.8	69.6	64.3
Armenia	102.8	111.8	49.8
Belarus	84.1	19.1	34.9
Tajikistan	50.0	33.1	28.6
Kyrgyzstan	39.1	31.1	27.7
Turkmenistan	34.2	47.1	248.4
Moldova	25.1	30.7	35.5

Source: U.S. Bureau of the Census

## Market of the Month: Ukraine

The U.S. Commercial Service has named Ukraine its "Market of the Month" for June. With a population of more than 47 million, Ukraine lies at a crossroads between Eurasia and Central Europe. The United States remains the country's largest foreign investor with slightly over \$1 billion invested since independence. Much of this initial foreign investment has gone into food processing, construction, and consumer industries. Today, more than 300 U.S. companies are represented in Ukraine. Best prospects for U.S. exporters include telecommunications, energy, oil and gas machinery, and agricultural machinery and equipment, airport/ground support equipment, pharmaceuticals and medical equipment, food processing and packaging equipment, and computers and peripherals.

To learn more about this market, go to [www.export.gov](http://www.export.gov) and click on the Market of the Month feature on the right hand side, and visit BISNIS online at <http://bisnis.doc.gov/ukraine>.



## Batimat (Construction Materials, Equipment, and Technology)

September 14–17, 2004  
St. Petersburg, Russia

The construction industry is one of the most rapidly developing sectors of the Russian economy. In addition, there is significant and increasing interest from Russian distributors in American building products, equipment, and technology. Batimat is one of the most prominent trade shows devoted to construction industry in Russia. Participation in the U.S. Commercial Service's Product Literature Center at the Batimat show will enable U.S. firms to test this exciting market for their products.

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# BISNIS

*Facilitating Commercial Success  
in Eurasia*

BISNIS is the U.S. government's primary market information center for U.S. companies exploring business opportunities in Eurasia. Operated by the **Market Access and Compliance** unit of the **International Trade Administration**, BISNIS disseminates information in print form, electronically, and through consultations by its staff of trade specialists.

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*Articles by non-U.S. government employees express the views of the authors and should not be construed as a statement of U.S. government policy.*

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# Seeking New Business Through the Asian Development Bank

by Ellen House

The Manila-based Asian Development Bank (ADB), a multi-lateral, development finance institution owned by 61 members, including the United States, provided \$6.1 billion in loans to its members in 2003 and approved 315 technical assistance projects, amounting to \$177 million. ADB lending and technical assistance provide business opportunities for U.S. suppliers of goods and equipment, contractors, and consultants. ADB projects represent an attractive opportunity for business in Asia because they are fully financed and bid according to international competitive guidelines. Participation in an ADB-funded project can provide opportunities to enter new target markets and build experience, ultimately leading to related work in the region. In Eurasia, ADB is active in Azerbaijan, Kazakhstan, Kyrgyz Republic, Tajikistan, and Uzbekistan (see inset box).

Traditionally, most ADB support has gone toward agriculture and rural development, but in recent years, the social infrastructure sector, including health, education, and water supply have been a major focus. ADB's principal tools are loans, guaran-

tees, and technical assistance, which it mainly provides to governments for specific projects and programs.

In order to win procurement and consulting contracts, it is important for U.S. companies to become thoroughly familiar with the bidding processes and market themselves to relevant ADB and executing agency personnel.

## Consulting

In 2003, U.S. companies won \$346.4 million worth of consulting contracts for ADB loans and technical assistance (TA) projects. To be considered for employment, consultants must register on the ADB DACON (data on consulting firms) or DICON (data on individual consultants) systems, which can be done online at [www.adb.org/consulting](http://www.adb.org/consulting). Expressions of interest (EIO) are not accepted from non-registered consultants. It is important to keep in mind that for TA projects, ADB recruits consultants directly, and for loan projects, the executing agency of the borrowing country makes the procurement decisions and recruits consultants.

For TA projects, the following evaluation criteria are considered for procurement of consulting services:

- Qualifications of proposing firm, e.g., experience in similar projects and geographical areas.
- Approach and methodology, e.g., innovativeness, work program, counterpart facilities, and proposal presentation.
- Personnel, e.g., caliber and availability of international and domestic consultants.

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## ADB Activities in Eurasia

**Azerbaijan:** ADB Country Strategy for 2004–2006 earmarks some \$105 million for assistance on four strategically selected areas—assistance for internally displaced persons, agriculture and rural development, water supply and sanitation, and roads. The loans will be complemented by a technical assistance program covering 12 projects and totaling \$6 million.

**Kazakhstan:** During 2004–2006, ADB Country Strategy calls for a \$190 million program of four loans focusing on rural development, natural resource management, rural water supply, and road rehabilitation. These are in addition to the \$34.6 million loan ADB recently approved for a rural water supply and sanitation project. A technical assistance program calls for spending of \$6 million. Cofinancing will be actively pursued to support priority projects beyond this amount.

**Kyrgyz Republic:** ADB Country Strategy for 2004–2006 plans a \$90 million loan program focusing on promoting private sector-led growth and human development. Six loan projects will cover agricultural development, financial sector reforms, and improved trade linkages. ADB will also focus on the education sector, with support

for basic education and early childhood development. Technical grant assistance will total about \$6.5 million.

**Tajikistan:** ADB plans a \$100 million loan program in the next three years to help build the country's rural infrastructure and promote regional cooperation. Total lending amounts will depend on country performance and ADB resource levels. The program focuses on infrastructure rehabilitation. The technical assistance program will amount to \$1.8–2.2 million a year. Besides project preparation and capacity building, the grants will support regional initiatives to train central bank officials, modernize customs facilities, and carry out diagnostic studies on water management and tourism.

**Uzbekistan:** ADB Country Strategy for 2004–2006 calls for extending loans of \$100–150 million per annum. The loan program will promote economic growth through higher agricultural productivity, human development through health and education sector reforms, and good governance and enterprise reform. The program also includes three regional infrastructure projects to promote regional cooperation. The technical assistance program will amount to \$1.9 million for 2004. This will be supported by cofinancing, where possible.

*U.S. EXPORTS TO EURASIA continued from page 1*

machines, cattle, medical and surgical supplies, tobacco, trucks and tractors, and agricultural machinery.

A favorable export picture for first third of 2004 may indicate that this year will bring further growth of U.S. imports into Russia. U.S. exports to Russia during January-April 2004 totaled \$857.0 million, up from \$687.4 during the same period last year, a nearly 25 percent increase. U.S. machinery continued to be the leading export category, amounting to more than a quarter of total exports and accounting for a large portion of the increase.

## Western Eurasia

The western part of Eurasia (Ukraine, Belarus, Moldova) imported nearly \$340 million worth of goods from the United States in 2003, up from \$305 million in 2002. However, this increase can be attributed largely to a \$50 million passenger plane purchased by Belarus, whose imports from the United States grew to \$84 million from \$19 million in 2002. Exports to both Ukraine and Moldova fell slightly, with the drop for Moldova being mainly due to a decrease in U.S. assistance. Ukraine was the United States' main trading partner in the region with \$230.6 worth of imports in 2003, down from \$254.8 million in 2002. While the overall decrease in U.S. exports to Ukraine can be attributed mainly to a drop in aircraft purchases, a number of other items saw significant increases in sales, including cars, poultry, parts for oil machinery, prefabricated buildings, and perfumes and toiletries.

## Central Asia

U.S. exports to the five Central Asian countries (Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan) fell significantly, dropping to \$548 million in 2003 from \$854 million the year before. Here, a decline in aircraft sales to Kazakhstan can be seen as the main factor causing the overall decrease. Although exports to Kazakhstan and Turkmenistan dropped, shipments to the other three countries showed increases. Excluding this airline factor, sales to Central Asia strengthened in several areas. Machinery and equipment for oil, gas, and agricultural sectors are key exports, along with poultry and charitable donations.

Uzbekistan led Central Asia in U.S. imports with \$257 million, up from \$137 million in 2002. The increase was mainly due to the purchase of aircraft, although growth was also seen in sales of agricultural equipment and oil and gas machinery. Kazakhstan experienced growth in imports of machinery for oil and gas, telecommunications equipment, and construction materials in 2003, but overall imports from the United States fell significantly because of a drop in airplane purchases. Charitable donations were the top exports to Kyrgyzstan and Tajikistan. In general, U.S. assistance to Kyrgyzstan, Tajikistan, and Uzbekistan

grew substantially in 2003 from 2002, reflecting these countries' key roles in the war on terrorism. Turkmenistan's purchases of harvesting machinery declined significantly in 2003, but were still the top import.

## Caucasus

U.S. exports to the Caucasus region (Armenia, Azerbaijan, and Georgia) experienced another year of growth, expanding to \$353.6 million in 2003 from \$280 the previous year. Both Georgia and Azerbaijan increased imports from the United States, while Armenia went from the top importer in the region to the last. The main export category to Azerbaijan continued to be equipment and machinery for the oil and gas sector, increasing by 41 percent in 2003 over 2002. Other major exports items were poultry products and cigarettes, both of which grew substantially last year, while the fourth main category, charity, fell by 16 percent. Top three U.S. exports to Georgia in 2003 were poultry products, parts for oil machinery, and small planes, all of which showed significant growth, while the fourth largest export, charitable donations, fell by nearly 20 percent compared with 2002. Top export to Armenia in 2003 was again aircraft, followed by charity, which fell by some 10 percent from 2002. Other major export categories were jewelry, gold, and diamonds, reflecting the strength of Armenia's diamond-cutting and jewelry-making sectors.

To find trade data for U.S. merchandise trade to global markets, visit *TradeStats Express™* at <http://ese.export.gov>.

## Central Asia Legal Events

### INTERNATIONAL COMMERCIAL ARBITRATION Developments in Arbitration Laws, Rules and Practices

#### Almaty, Kazakhstan

17 September 2004

#### Bishkek, Kyrgyz Republic

15 September 2004

Sponsored by: The Arbitration Institute of the Stockholm Chamber of Commerce

For information on the Kazakhstan event, contact Mrs. Christina Franzén-Papazov (in Stockholm) at tel: +46 (8) 555 100 51 or [christina.franzen-papazov@chamber.se](mailto:christina.franzen-papazov@chamber.se) or Ms. Olga Evseeva (in Almaty) at tel: +7 (3272) 58 23 80 or email: [oevseeva@salans.com](mailto:oevseeva@salans.com).

For information on the Kyrgyzstan event, contact the Chamber of Commerce and Industry of the Kyrgyz Republic at email: [arbitr@elcat.kg](mailto:arbitr@elcat.kg).

# Russia's Fast Growing Consumer Goods Market

by Marianne Drain

Today, with at least twice as much to spend on consumer goods than in 1998, shoppers in Russia are worth a second look. Consumer expenditures in Russia, generally underrated by official statistics and overlooked by the global market, are believed to be \$270 billion strong, according to Business Analytica, a leader in Russian market research. If oil prices remain high and the political scene relatively stable, economists predict the current shopping spree could last several years. Renaissance Capital, a Moscow-based brokerage, reported that Russian retail sales grew 23 percent in 2003, reaching \$146 billion, and they are expected to grow by a minimum of 12 percent in 2004. Currently, the strongest growth areas in consumer purchasing include household chemicals and cleaning agents, cosmetics, home appliances, and sporting goods. Although competition is heating up in Russia's consumer goods market, it is not too late to make a strong entry for companies whose products or strategy fit the market.

## A More Sophisticated Shopper

It was not that long ago that little choice was available to Russian shoppers, and what was offered was poorly made. After over a decade of choice, the Russian consumer has become more familiar with the products available in the global marketplace, and is increasingly becoming more quality conscious. Moreover, the role of branding and advertising in the Russian market is growing more and more important.

The good news for U.S. competitors is that the strong influence of American mass culture creates indirect advertising for American goods, and there remains an overall trust in the quality of American non-food products. However, U.S. companies will still face some challenges in the market. European competitors, closer to the market, usually have an advantage in shipping and transportation costs. Currently, within the Russian marketplace, U.S.-brand goods are lost among the diversity of European products, which have become far more widely known to Russians. American goods are also not surprisingly more expensive than domestic goods, which are increasingly becoming a major source of competition. Over the last two years, the consumption volume of U.S. products has decreased noticeably in the face of tighter European and domestic competition.

## Advertising Can Make a Difference

Nonetheless, there remains a real opportunity for U.S. products, and the key may be in a business in which America excels: advertising. Experts uniformly agree that the Russian consumer is particularly sensitive to advertising, and that American products are under-advertised in the Russian marketplace. Keeping in mind that advertising is a relatively new concept in Russia, and as such isn't seen as an annoyance, it is clear why advertising has such power in this. As a result, the advertising budgets of large companies in Russia rival those of advertising budgets in the American or European market. Ads must also be targeted specifically to this market, and not be the same as those seen globally.

Along with advertising, U.S. products can strengthen their position on the Russian shelf by properly adapting packaging and labeling. Many U.S.-origin products have no Russian text or directions and this lack of targeting by the U.S. producer does little to help win over Russian consumers. U.S. companies serious about the Russian market should clearly label their products with complete information in the local language.

## Beyond Moscow

U.S. companies are also advised to think beyond the capital city when seeking new customers and distribution networks. Although the highest incomes are concentrated in St. Petersburg and Moscow, the competition is concentrated there as well. There are more than 12 cities in Russia with a population of over one million, including Samara, Yekaterinburg, and Novosibirsk, and Russians in the provinces have money to spend as well.

However, U.S. companies should be aware that some of the main difficulties U.S. firms may encounter in doing business in Russia, such as lack of funding available to Russian firms and the need for establishing consignment warehouses, are even more prevalent in less populated areas.

## Resources for U.S. Companies

- BISNIS representatives in Russia collect market information and trade leads as well as identify potential partners (for example, a recent Search for Partner lead from the Russian Far East featured an experienced distributor of U.S. products looking to represent more product lines, see <http://bisnis.doc.gov/bisnis/lead.cfm?1294>). Market reports on the Consumer Goods sector can be found at <http://bisnis.doc.gov/consumer> and leads are at <http://bisnis.doc.gov/leads>.
- U.S. companies can also advertise their products or seek distributors throughout the Eurasian market by taking

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*ASIAN DEVELOPMENT BANK continued from page 3*

According to the U.S. Department of Commerce office at the ADB, U.S. companies should seek to be competitive by marketing themselves and forming relationships with key players. Key points to remember include:

- Individual *team leaders* need name recognition, not just company reputation.
- Once personal relationships are established, firms can ask probing questions, such as What's required to be short-listed? or Who's on the evaluation committee?
- TA business is challenging...ADB officers want more than they need and ask for more than they're paying for.

## Procurement

Under ADB public sector loans, procurement decisions are split in a specific way between ADB and the borrower country. The ADB reviews and approves per guidelines the bidding documents, bid evaluation report, and proposed contract award. In addition, it forms the procurement evaluation committee and disburses funds. The borrower prepares bidding documents, issues tenders, evaluates bids, and awards contracts.

In-country representation is useful, if not essential to successfully bid on ADB procurement tenders. Most ADB procurement (usually those above \$500,000 for supply contracts and \$1 million for civil works) is done through international competitive bidding. However, many small procurements are done through International Shopping or Local Competitive Bidding. U.S. companies will want to read the ADB Procurement Guidelines to ensure compliance with and understanding of ADB procedures before participating in any bids.

U.S. Department of Commerce suggests that, in order to be competitive, U.S. firms should gather knowledge and information about the borrower country and consider the advantages of establishing a local presence, but companies can also seek to leverage technology to build presence and credibility.

## Pursuing ADB Opportunities

Interested U.S. companies should take a strategic approach to pursuing contracts from ADB. Some key steps are:

- Conduct research on ADB activities and plans for a given market by reading the ADB Country Strategy and Program, the Report and Recommendation of the President, the TA Report (for TA Projects), and Sector Policies, all available on the ADB Web site.
- Frequently monitor the ADB's Opportunities Web page ([www.adb.org/opportunities](http://www.adb.org/opportunities)), which offers information on

opportunities for contractors, consultants, investors, and job applicants, as well as information about proposed projects, procurement, contract awards, and guidelines on the hiring of consultants.

- Make essential contacts, including with the executing agency staff, ADB headquarters project officer, U.S. Commercial Service in Manila, Commercial Service staff in borrower country, and the ADB resident mission in the borrower country. ADB also maintains a North American Representative Office in Washington, DC (email: [naro@adb.org](mailto:naro@adb.org), [www.adb.org/NARO](http://www.adb.org/NARO)).

For those companies that have had little to no experience working with the ADB, one way to begin work on its projects is to seek subcontracting opportunities with larger firms that have won ADB contracts. Many large consulting firms maintain an active database of registered subcontractors with whom they do business. The ADB Web site provides information both on firms that win consulting contracts and those that win contracts for goods or civil works with a value above \$1 million ([www.adb.org/Documents/ADBBO/contracts.asp](http://www.adb.org/Documents/ADBBO/contracts.asp)). In addition, the Web site has lists of prequalified contractors and firms shortlisted for technical assistance contracts.

*The U.S. Commercial Service Liaison Office for the Asian Development Bank in Manila is available to assist U.S. companies to obtain a fair share of ADB market opportunities. For further information and contacts, view [www.buyusa.gov/adb](http://www.buyusa.gov/adb).*

*RUSSIA'S CONSUMER GOODS MARKET continued from page 5*

advantage of BISNIS ExpoLink Eurasia, a program that allows U.S. companies to participate in a virtual exhibition in the Russian language, free of charge. For more information, visit [www.bisnis.doc.gov/expolink](http://www.bisnis.doc.gov/expolink).

- Trade shows are a good resource to learn about market and the competition, and to find potential distributors or representatives. In the United States, some trade shows attract delegations of companies/buyers from Russia. Information on upcoming events can be found at [www.bisnis.doc.gov/bisnis/events.cfm](http://www.bisnis.doc.gov/bisnis/events.cfm).
- In Russia, the U.S. Commercial Service (CS) offers programs to assist U.S. exporters with market entry. For example, CS Moscow considers the upcoming Federal Wholesale Trade Fair for Apparel and Textile Products and Equipment, September 21–24, 2004, an ideal opportunity for interested U.S. firms to establish contacts with Russian distributors, manufacturers, and wholesalers. For more information, visit <http://bisnis.doc.gov/bisnis/bisdoc/04AppText.htm> or contact Marina Parshukova in Moscow (email: [marina.parshukova@mail.doc.gov](mailto:marina.parshukova@mail.doc.gov)).

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## How Best to Pursue EBRD Consulting Contracts

The European Bank for Reconstruction and Development (EBRD) makes extensive use of consultants to execute its technical assistance program and to assist in project preparation and implementation. In 2003, EBRD financing activities generated 109.71 million Euro worth of opportunities for consultants, of these 7.62 percent (8.36 million Euro) of contracts were won by U.S. firms.

BISNIS held a teleconference with Dilek Macit, head of **EBRD's** Consultancy Services Unit, on May 5 for U.S. companies to learn more about how to adopt an informed and strategic approach to pursuing consultancy opportunities from the EBRD.

### The main areas addressed by Ms. Macit were:

- funding sources of consulting activities of the EBRD,
- statistics about the volume of business and main sectors,
- advice to help U.S. consultants determine how to market their activities,
- how to formally participate in the consultant selection process, and
- tips on how to win contracts and get business from EBRD.

***For a full transcript of the teleconference or to view Ms. Macit's PowerPoint presentation, visit BISNIS Online at <http://bisnis.doc.gov/consulting>.***

## How to Approach Procurement in EBRD financed projects

BISNIS held a teleconference with Maurice Lepage, director of **EBRD's** Procurement and Purchasing Department, on May 26 for U.S. companies to learn more about EBRD's procurement principles and how to get business with the EBRD. In 2003, EBRD financed 181 contracts (worth 720 million Euro) for goods and services in following sectors: municipal infrastructure, transportation, power and energy efficiency, telecommunications, natural resources, and nuclear. Mr. Lepage strongly encouraged U.S. companies to take advantage of these funded opportunities to sell to the region and bid on EBRD projects. In 2003, U.S. companies submitted only 14 bids against the total of 656 tenders. Of those U.S. bids, four were awarded contracts, representing an impressive 29 percent success rate.

### Some of the main areas addressed by Mr. Lepage were:

- the details of the project cycle and the rules and regulations that cover the public sector projects,
- the role of the borrower versus that of EBRD in project procurement and operations,
- types of contracts that EBRD finances through its loans,
- the characteristics and benefits of an open tendering process, and
- how to take a strategic approach toward identifying procurement opportunities and bidding for them.

***For a full transcript of the teleconference or to view Mr. Lepage's PowerPoint presentation, visit BISNIS Online at <http://bisnis.doc.gov/finance>.***

***For more information on the EBRD, visit [www.ebrd.com](http://www.ebrd.com).***

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## BISNIS Outreach Continues!

### Don't miss BISNIS in

Austin, Tex.	July 14
Portsmouth, N.H.	July 20
Pittsburgh, Penn.	July 22

These events will feature presentations by, and one-on-one meetings with, BISNIS representatives from Armenia, the Kyrgyz Republic, Moldova, and Ukraine.

For more information, visit  
<http://bisnis.doc.gov/outreach04> or contact Ellen House  
([ellen\\_house@ita.doc.gov](mailto:ellen_house@ita.doc.gov)) or Irina Mitchell  
([irina\\_mitchell@ita.doc.gov](mailto:irina_mitchell@ita.doc.gov)), BISNIS, DC.

### Trade Events Calendar

<b>Bishkek Telecom</b> Organizer: Web site:	<b>August 24–27, 2004</b> ITE Group Plc <a href="http://www.caspianworld.com">www.caspianworld.com</a>	<b>Bishkek</b>
<b>SamaraTransExpo</b> Organizer: Web site: Sectors:	<b>September 14–17, 2004</b> ExpoDom <a href="http://www.expodom.ru">www.expodom.ru</a> Automobiles, vehicles, transport, service stations	<b>Samara</b>
<b>Business Expo</b> Organizer: Email: Sector:	<b>September 15–18, 2004</b> ITE Group Plc <a href="mailto:chris.christofi@ite-exhibitions.com">chris.christofi@ite-exhibitions.com</a> Business support services	<b>Moscow</b>
<b>Textil Expo</b> Organizer: Web site: Sector:	<b>September 23–26, 2004</b> Iteca <a href="http://www.textile.iteca.kz">www.textile.iteca.kz</a> Textiles, technologies and equipment for the light industry	<b>Almaty</b>
<b>Agroprod mash</b> Organizer: Web site: Sectors:	<b>October 4–8, 2004</b> Expocentr ZAO <a href="http://www.expocentr.ru">www.expocentr.ru</a> Machinery and equipment for processing, packaging, transportation and storage of food productions, packaging equipment and materials	<b>Moscow</b>

This notice is provided solely as an informational resource and does not constitute an endorsement by the U.S. Department of Commerce. For a complete listing of Eurasia trade events, visit <http://bisnis.doc.gov/bisnis/events.cfm>.